



State of Wisconsin
Governor Tony Evers

TO: **Child Care Eligibility and Authorization Workers
and Supervisors
Income Maintenance Supervisors
Income Maintenance Staff
Training Staff
Child Care Coordinators**

DECE/BELP OPERATIONS MEMO

No: 19-18

DATE: 04/22/2019

Wisconsin Shares Child Care

FROM: Kath McGurk, Director
Bureau of Early Learning and Policy
Division of Early Care and Education
Department of Children and Families

**SUBJECT: Processing a Wisconsin Shares Post Load Benefit Correction (PLBC)
and Retro Authorization or Monthly Benefit Load on the Same Day**

CROSS REFERENCE: [CSAW PLBC User Guide](#)

EFFECTIVE DATE: April 26, 2019

PURPOSE: The purpose of this Operations Memo is to inform Wisconsin Shares Child Care Subsidy agencies about system enhancements to the Child Care Statewide Administration on the Web (CSAW) system. These changes will allow the system to process retro authorizations, Post Load Benefit Correction (PLBC) requests, and monthly benefit loads on the same day.

BACKGROUND: Currently, CSAW prevents users from calculating retro authorizations (authorizations for a current or past month) if there is an existing PLBC request associated with the case, and the PLBC request is in Calculated or Confirmed status. The PLBC could be either a Case PLBC request or a Provider PLBC request. In these situations, CSAW will display a validation message: *"The case number cannot be calculated due to existing Calculate/Confirmed PLBC. Please reset PLBC calculation or wait until tomorrow to calculate this Retro authorization."*

CSAW also prevents users from calculating a PLBC request when there is an existing retro authorization in Confirmed status for an associated case. A retro authorization enters Confirmed status when either the user or the system calculates the authorization, but the benefits for that authorization have not yet loaded to the parent's Electronic Benefit Transfer (EBT) card. In these situations, PLBC will display a validation message: *"The request cannot be calculated due to existing Confirmed retro authorization. Please wait until tomorrow to calculate this request."*

Additionally, a PLBC request that is in Calculated or Confirmed status on the last business day of the month will cause the monthly benefit load to fail for cases associated with that PLBC request. The PLBC could be either a Case PLBC request or a Provider PLBC request. In these situations, CSAW generates a Dashboard task for the Wisconsin Shares agency: “*Benefit Load Failed-PLBC Correction Issue.*”

When a worker calculates a PLBC request but does not confirm it, that PLBC request can remain in Calculated status indefinitely.

AUTOMATION:

Allowing Monthly Load

As of April 26, 2019, a PLBC request in Calculated or Confirmed status on the last business day of the month will no longer cause the monthly benefit load to fail for cases associated with that PLBC request. This is true for both **Case** and **Provider** PLBC requests.

Resetting Calculation for PLBCs Left in Calculated Status

PLBC requests enter Calculated status when a worker calculates the request, but does not confirm the PLBC request calculation. Each night, the system will automatically reset the calculation for **Case** and **Provider** PLBC requests left in Calculated status. The PLBC status will return to In Progress. This functionality prevents unconfirmed PLBC requests from affecting the family’s future benefit amounts.

Summary of PLBC-Retro Auth Changes

PLBC Request Type	PLBC Status	Can Calculate Retro Auth?	Worker Action	Resulting Status (after overnight batch run)
Case	Calculated OR Confirmed	Yes	Click “Confirm” on <i>Confirm/Apply Case Benefit Changes</i> page*	PLBC & retro auth = Processed
Provider	Calculated	Yes	Click “Confirm” on <i>Confirm/Apply Case Benefit Changes</i> page	<ul style="list-style-type: none"> • PLBC not confirmed before end of day: PLBC = In Progress; retro auth = Processed • PLBC confirmed before end of day: PLBC & retro auth = Processed
	Confirmed	No	Wait until PLBC is processed, then calculate retro auth	PLBC = Processed; Retro auth = Completed
* If the Case PLBC was in Calculated status, clicking “Confirm” on the <i>Confirm/Apply Case Benefit Changes</i> page will change the PLBC status to Confirmed				


Allowing Retro Authorization Calculation

CSAW will no longer prevent workers from calculating retro authorizations (authorizations for a current or past month) when there is either a **Case** PLBC request in Calculated or Confirmed status or an associated **Provider** PLBC request in Calculated status.

However, CSAW will continue to prevent the worker from calculating retro authorizations if there is an associated **Provider** PLBC request in Confirmed status. If the worker tries to calculate benefits for a retro authorization, and there is an associated Provider PLBC request in


Confirmed status, the worker will receive a validation. The worker must wait overnight to allow the Provider PLBC request to process before calculating the retro authorization.

The following error has occurred

 Benefits for this case cannot be calculated because there is a Provider PLBC in Confirmed status. Please wait until tomorrow to calculate benefits.

Confirm/Apply Case Benefit Changes Page

If there is a **Case** PLBC request in Calculated or Confirmed status, or a **Provider** PLBC request in Calculated status, and the worker calculates a retro authorization, CSAW will redirect the worker to a new *Confirm/Apply Case Benefit Changes* page. The page will show the effect of processing both the PLBC request and the retro authorization changes at the same time. This page is informational only, and the worker should click “Confirm Benefits.”

 There are one or more PLBCs in Calculated or Confirmed status. The PLBC changes are automatically included in the calculations below.

Confirm/Apply Case Benefit Changes

Test Case

Case Details

Case Number	4150998647	Admin Agency	Dane County (13)
Primary Person	Tony Wonder	RFA Date	11/01/2017
Address	1202 Aberg Ave Madison, WI 53714 Dane County	Review Date	N/A
		CC AG Status	Closed

Retro/PLBC Benefit Details

	Child's Name	Date of Birth	Provider Details	Previous Benefit	Current Benefit	Calculated Change	Remaining Balance	
▼	May 2018							
	Tonya Wonder	01/01/2011	9800039909-001 Nordic Wonderland 123 Modified Addrss, Northwoods , WI 45454	\$306.30	\$450.58	\$144.28	\$0.00	Apply To Family ▼
	Tonya Wonder	01/01/2011	0800039980-001 Lip Sticks House 201 East Johnson, Madison , WI 53704-9877	\$0.00	\$172.88	\$172.88	\$0.00	Apply To Family ▼

Confirm Benefits

If the PLBC request is a **Case** PLBC request and worker chooses the “Confirm Benefits” button, both the retro authorization and the Case PLBC request will process overnight. If the Case PLBC request’s status was previously Calculated, choosing the “Confirm Benefits” button will change the PLBC request status to Confirmed.

If the PLBC request is a **Provider** PLBC request and the worker chooses the “Confirm Benefits” button, and the PLBC request is still in Calculated status at the end of the day since nobody has changed the status to Confirmed, the system will automatically reset the calculation for that PLBC. The PLBC will return to In Progress status. In this situation, the system will remove the PLBC request details from the calculation before the retro authorization benefits are loaded that night. This functionality prevents provider adjustments from affecting the family’s retro authorization amount.

EXAMPLES:**Case PLBC Request Example**

Margaret is the daughter of single father, Jacque. Margaret is authorized to Cat's Pajamas Daycare from January 1 to February 20. On January 30, Jacque begins working more hours and Margaret's child care need increases.

On February 4, Jacque requests an increase to Margaret's authorization hours. The worker determines that all requirements are met, and that an increase to the authorization hours is correct per policy. The worker creates a Case PLBC request to increase Margaret's authorization hours for February. The worker calculates and confirms the PLBC request.

On the same day, Jacque requests a retro authorization for Margaret to Cat's Pajamas for February 21 to February 28. The worker creates the authorization. When the worker completes the retro authorization and calculates benefits, they are taken to the *Confirm/Apply Case Benefit Changes* page. The page combines the increased hours from the PLBC with the new hours from the retro authorization, and shows the total effect to the benefit amount. The worker clicks "Confirm Benefits."

Overnight, the amount from the *Confirm/Apply Case Benefit Changes* page loads and both the retro authorization and the PLBC request move into Processed status.

Provider PLBC Request in Calculated Status Example

Tyler is the son of single mother, Charisa. Tyler is authorized to Bee's Knees Daycare from February 22 to February 28.

On March 29, the Department of Children and Families (DCF) determines that Bee's Knees was overcapacity for two days in February. DCF creates a Provider PLBC request to recover funds for the two days when the provider was overcapacity. DCF calculates the PLBC request, but does not confirm it. The negative adjustment from this Provider PLBC request defaults to "Apply to Provider."

Also on March 29, Charisa calls her Wisconsin Shares agency to report that Tyler's authorization start date was supposed to be February 8, not February 22. The worker determines that an agency error was made and Charisa is correct. The worker completes a retro authorization to Bee's Knees for February 8 to February 21. When the Wisconsin Shares worker calculates benefits, they are taken to the *Confirm/Apply Case Benefit Changes* page. The page combines the negative adjustment from the Provider PLBC request (even though it should be applied to the provider) with the new hours from the retro authorization, and shows a new benefit amount. The worker clicks "Confirm Benefits."

At the end of the day, the PLBC request for Bee's Knees is still in Calculated status, and has not been Confirmed. The system resets the calculation for the Provider PLBC request and the PLBC status becomes "In Progress." The system loads the benefit amount for the new hours from the retro authorization without including the Provider PLBC details. The retro authorization moves into Processed status.

CONTACTS:

For Wisconsin Shares Child Care policy questions outside of Milwaukee County contact your Bureau of Regional Operations (BRO), Child Care Coordinators at BROCCPolicyHelpDesk@wisconsin.gov.

For questions about negative Child Care adjustments, contact the Bureau of Program Integrity using the [BPI Technical Assistance Form](#).

For all other Child Care CARES/CWW and CSAW Processing Questions statewide, and policy questions in Milwaukee County, contact the Child Care Subsidy and Technical Assistance line at: childcare@wisconsin.gov or (608) 422-7200.

DCF/DECE/BELP/RMH